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JUN 19 '84

horticultural products

Approved by the World Agricultural Outlook Board • USDA

FHORT 3-83 March 1983

HORTICULTURAL PRODUCTS REVIEW

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EXPORT SUMMARY

Export performance by horticultural products continues to lag behind last year's pace. Nevertheless, some improvement over recent months was evident during January. Total horticultural export earnings in January 1983 were \$210 million, 4 percent below January 1982 but much better than the overall results for the first 3 months of fiscal year (FY) 1983 which fell 11 percent from the same period a year earlier.

Fresh citrus exports were noteworthy for their strong January showing. Overseas movement of both lemons and grapefruit is now running ahead of last year. Most of the increased volume is attributed to larger sales to the Japanese market. Recently, the European Community (EC) has showed signs that it also might be in line for heavier imports of U.S. citrus. Grapefruit and lemon exports, particularly to France, were up sharply in January. U.S. lemon exports are expected to be further stimulated by February freeze losses in Spain. A joint FAS-industry team will survey Spanish citrus growing areas in early March for a first-hand assessment of the weather damage and potential impact on U.S. exports. While still early in the 1982/83 marketing season, orange exports in January began to pick up steam. The larger U.S. crop outturn and export availability anticipated this year will encourage heavier orange shipments as the year progresses.

For further information on items in this circular, contact the Horticultural and Tropical Products Division, (202) 447-6590. All measures in this report, unless noted otherwise, are metric. One kilogram (kg)=2.2046 lbs., l metric ton=2,204.62 lbs., l liter=0.2642 gallon, and l hectare=2.471 acres.

Export sales of dried fruit, especially dates, raisins, and prunes, also were up in January. Date exports are benefitting from a stronger French demand as a result of the smaller Tunisian crop. U.S. raisin exports are beginning to gain support from an industry funded export incentive program.

U.S. EXPORTS OF HORTICULTURAL PRODUCTS

Oct. 1981-Jan. 1982	: Oct. 1982-Jan. 1983
1,000 Do	ollars
474.250	467,366
249.863	184,599
212,003	204,300
99.250	92,773
77,230	22,773
183,116	163,287
	20,073
	22,167
	950,265
1,002,202	750,205
	474,250 249,863 99,250 183,116 23,138 22,615

MARKET ACCESS AND OPPORTUNITIES

- --Sweden's import opening date for apples was established February 22, 1983, by the Agricultural Market Board. The date was a compromise reached after negotiations by producers and importers. The late opening date is mainly due to large domestic apple supplies.
- --Spain has announced the following global imports quotas for 1983 in terms of pesetas (1982 quotas in parentheses): canned fruit, 153,914,274 (139,922,068); and hops 151,039,523 (137,308,568). Currently, one dollar is equal to 131 pesetas.
- --Australia lifted its ban on fresh avocado imports from the United States as of February 16, 1983. Imports will be approved provided each shipment is accompanied by a phytosanitary certificate certifying that the fruit originated in groves free of sunblotch viroid.
- --Guidelines on the current application of the French language requirements for imports which were imposed by France on October 20, 1982 (Horticultural Products Review, December 1982) have recently been developed by the American Embassy in Paris in cooperation with the U.S. Department of Commerce. These guidelines state that entries on documents necessary for shipment to France, e.g., invoices, ocean bills of lading or airway bills, certificates of origin and health certificates (if required), and insurance documents and packing lists (if included), must be in French or accompanied by a French translation.

French Customs is currently permitting French freight forwarders or importers to provide translations of the entries on standard shipping documents. Juridical translations are not required; simple translations suffice. Products must be marked with country of origin. English language designations such as "made in..." or "manufactured in..." are permitted.

Where goods are clearly destined for direct sale to consumers, French Customs has the responsibility through random checking to see that the information on labels, packages, instructions, etc., is in French or that French translations accompany the goods and are available to the consumer at the point of sale.

U.S. firms are urged to remain in close contact with their French customers, agents and freight forwarders regarding enforcement of the French language requirements. The circular of October 20, 1982, is legally so all-embracing that it permits much more rigorous application of French language requirements than has been the case so far. The practice of the French Customs authorities is determining, and the enforcement of the language requirements is always subject to change, perhaps without notice.

--The United Kingdom's Ministry of Agriculture, Fisheries and Food has issued a reminder that new food labeling regulations came into effect in the United Kingdom on January 1, 1983. These new regulations introduce a number of changes in the labeling of prepacked foods, among them the concept of compulsory open date marketing.

Effective January 1, most food has to be marked in a way which tells the consumer how long the food will retain its specific properties and, therefore, remain at its best. In general this period will be expressed as "best before" followed by the date. Perishable foods which are intended to be consumed within six weeks of being packed may be marked "sell by" followed by the last recommended date of sale and an indication of the minimum period from the date of purchase for which the food can reasonably be expected to retain its specific properties. Whichever formula is used, any necessary storage instructions have to be given.

Datemarking is not required for some foods. These include long life foods (those with a life of 12 months or more) and frozen foods for which the voluntary "star marking" system is already extensively used.

The new regulations reduce the number of exemptions from the requirement to list ingredients. Also, additives used in foods have to be declared in the ingredient list. Some will be declared as previously, using such terms as antioxidant, preservative, emulsifier, and so on, but others must be shown by a category name followed by a specific name or serial number.

--The Government of Japan announced a grape juice global import quota of 3,200 metric tons (5:1 concentrate basis). This brings the total allocation for the Japanese fiscal year 1982 (April 1982-March 1983) to 4,000 tons compared with 3,600 tons and 1,800 tons in 1981 and 1980, respectively. The quota is valid for ten months after issue. Allocation of grape juice quotas are made on an "as needed" basis. According to the Japanese government, increases in the quota reflect growing consumer demand while domestic production has been stable at 1,000 tons. The quota is allocated to the four domestic juice associations for the manufacture of retail products by their member packers.

-- A reduced duty of 10 percent for 1,500 tons of cherries to be marinated in alcohol and used in chocolate was announced by the European Community. The normal duty is 32 percent. The tariff quota is applicable from January 1 to June 30, 1983.

--Hong Kong recently implemented increased import duties on wines. Duties on champagne and other sparkling wines were increased from HK\$15.60 per liter to HK\$30.00; still wines above 15 percent alcohol by volume from HK\$8.60 to HK\$20.00; still wines not more than 15 percent alcohol by volume from HK\$7.15 to HK\$17.00; still wines above 15 percent alcohol by volume, in casks, from HK\$4.95 to HK\$12.00; and still wines not more than 15 percent alcohol by volume, in casks, from HK\$4.30 to HK\$10.00 per liter. (U.S.\$1.00=HK\$6.61).

MARKET PROMOTION ACTIVITIES

--A salute to California and the West Coast was the theme of market promotion efforts March 3, 1983, by the U.S. Agricutural Counselor and Agricultural Trade Officer in London. In cooperation with the embassy's commercial section, the salute to California occurred to commemorate the royal visit of the Queen to California and Seattle. The show included wine tasting and product displays of California wines, dried fruit, and nuts.

--The National Association of State Departments of Agriculture (NASDA) and the Wine Institute have announced that they will jointly sponsor a tasting of American wines at 4:30 p.m. on Wednesday, May 18, 1983, at the NASDA National Food and Agriculture Exposition in Atlanta, Georgia. A representative from the institute will preside over the tasting and will comment on the wines displayed and available for sampling.

Rapidly expanding recognition of the quality and value of American wines has boosted U.S. wine exports by over four-fold in the past five years. Roughly 90 percent of these wines are from California. The Wine Institute, based in California and representing more than 400 wine producers, helps introduce traders and consumers to American wines through a worldwide tasting program.

NASDA is a nonprofit, nonpartisan association of the 50 state departments of agriculture and those from Puerto Rico, Guam, American Samoa, and the Virgin Islands. Members of this organization are the commissioners, secretaries, and directors of the Department of Agriculture in the states and the four island jurisdictions.

--Singapore, an attractive market for U.S. horticultural exports, has been the scene of several special American food promotions. With assistance from the Agricultural Trade Officer, a U.S. Food Fair was held at two stores of a major supermarket chain last summer. The fair had as its main objective an increase in shoppers' awareness of American food products. Among the major participants were the Cling Peach Advisory Board, local representatives of California wines, and major fruit and vegetable importers representing U.S. suppliers. Tri-color placards, price stickers and other decorations featuring the "A Taste of America" theme attracted customers as did special displays and samples. The stores had a 10-percent overall sales gain and a doubling in value of U.S. products sold over the same two weeks the previous year.

A menu promotion which featured U.S. foods was held in September in two leading Singapore hotels. A wide variety of U.S. dishes was featured including vegetables and fruits and accompanied by American wines and beers.

--The Cling Peach Advisory Board will initiate a major consumer campaign in Japan this spring titled "California Gold Rush." The Board, an FAS cooperator, will require consumers to cut out the California symbol from a can label in order to participate in the drawing for prizes. Retailers will also tie-in with the contest by building displays and sending in photographs to qualify for the prizes. Early indications are that a winning theme has been chosen, and the purchase of both cling peaches and fruit cocktail should increase as a result of the Gold Rush promotion campaign.

--The Foreign Agricultural Service will participate in ANUGA '83, to be held October 15-20, 1983, in Cologne, West Germany. ANUGA is one of the largest food trade shows in the world. the U.S. Food Exhibit, sponsored by FAS, will cover 1200 square meters of space and will accommodate up to 60 individual booths. Space will be allocated on a first-come, first-served basis. To receive an information and participation kit for this event, contact: Robert Francis, Exhibit Director, Export Promotion Division, Room 4945, FAS, USDA, Washington, D.C. 20250. Telephone: (202) 475-3409.

COMMODITY UPDATE

--As a result of the February 10-13 freeze in Spain's citrus area, the Agricultural Counselor has reduced the 1982/83 citrus crop estimate by 3 percent to 2.8 million tons. The 1982/83 lemon crop is currently estimated at 380,000 tons, a drop of about 10 percent from the estimate made prior to the freeze. This reduced output will limit export availability and could spur U.S. exports. The forecast for Spain's orange crop was reduced by 50,000 tons to 1.59 million tons.

Freeze damage to Spain's almond orchards is expected to limit the 1983 fall harvest to 40,000 tons (shelled basis), 20,000 tons below 1982's outturn. While the short-term impact on the United States will be muted by large U.S. and overseas inventories, this should prove to be a positive factor on next season's export shipments.

--Canada's Agricultural Products Board (APB) will purchase up to 11,500 tons of yellow onions from Ontario and Quebec. The announcement was made on February 10 by the Minister of Agriculture. The purchase should help offset the low prices brought about by a 1982 bumper crop of 139,000 tons in the two provinces. Growers will receive C\$1.50 (US\$1.22) per 50 lb. bag with the APB assuming grading, handling and transportation (inland and overseas) costs.

The APB plans to move the onions into nontraditional export markets. In 1982, Canadian exports to its traditional onion markets—the United States (60 percent), the Caribbean region (20 percent) and the United Kingdom (14 percent)—were down 40 percent from 1981 levels. Canadian officials do not expect exports to the United States to increase. U.S. onion imports from Canada were 4,061 tons in 1982, down 39 percent from the previous year. Cost of the purchase and resale program may total US\$810,000.

--The U.S. countervailing duty investigation against imports of Brazilian frozen concentrated orange juice (FCOJ) was suspended last month after an agreement was reached between the two countries on February 24, 1983. The accord calls for the Brazilian government to impose an export tax on FCOJ by April 30 which will completely offset the amount of the net subsidy provided by the Brazilian government to manufacturers, producers or exporters of FCOJ. The net subsidy amount will be established by the U.S. Department of Commerce at approximately 3.3 percent of the f.o.b. value, port of exit Brazil (roughly \$36 per ton of 650 brix). A notice of suspension of the investigation was published in the Federal Register on February 2, 1983. All interested parties to the proceedings including the Brazilian government and Florida Citrus Mutual—the U.S. petitioner—have 20 days from that date to request a continuation of the investigation. In such an event, Commerce will resume the investigation.

On February 18, Brazil increased its export duty on FCOJ from 1 percent to 20 percent. This revision of the export tax does not in itself, however, place Brazil in compliance with the agreement. This will be accomplished only by the creation of a specific tax category which serves exclusively as an offset to the Brazilian government's net subsidy. The net subsidy amount is subject to an annual review by the Department of Commerce. If at any time, the offsetting export tax is reduced below the net subsidy amount, Brazil would be in violation of the agreement and the countervailing duty investigation automatically reopened.

The agreement also specifies that until the imposition of the offsetting export tax, to be done no later than April 30, the rate of Brazilian exports of FCOJ to the United States will be restricted. The rate of FCOJ exports are not to exceed average monthly shipments to the United States during the June 1981-May 1982 period. Monthly Brazilian exports of FCOJ to the United States are, therefore, limited to 3.1 million gallons at 650 brix.

--A negative preliminary determination on the petition for countervailing duties on fresh asparagus from Mexico was issued by the International Trade Administration (ITA) of the Department of Commerce on March 2, 1983. The finding was based on statements received from the Government of Mexico on January 14 and February 16 which claimed that Mexican producers and exporters of fresh asparagus had received no benefits which would constitute bounties or grants as alleged by U.S. petitioners. A final determination will be made by May 9, 1983.

--The European Community (EC) spent nearly \$600 million on production and processing subsidies for horticultural products in 1981, according to a recent report from the EC Commission. Included among these subsidies were \$37 million for wine production aids and \$539 million for fruit and vegetable processing. These horticultural subsidies accounted for 15 percent of the \$4 billion in EC funds expended on agricultural production and processing aids in 1981. Amounts spent on export subsidies are not included in these figures.

--A further period of storage, until March 31, 1983, for certain quantities of dried figs and raisins held by Greek storage agencies has been authorized by the European Community. The December 21, 1982 decision was based on the opinion of the Management Committee for Products Processed from Fruit and Vegetables. The initial extension had approved storage beyond the 1981/82 marketing year only until December 31, 1982. The granting of aid to storage agencies is part of a system of production aids granted to member countries.

--Australia's 1983 sultana raisin pack will total approximately 69,000 tons, down 15 percent from the 1982 volume of 81,500 tons, according to the Agricultural Counselor in Canberra. The 1983 pack of lexia raisins--currently estimated at 6,000 tons--is expected to be nearly one-third below last season's 8,835 ton pack. Although the sugar content of this year's crop is exceptionally high, hot, dry weather in the major growing areas reduced berry size.

--New Zealand's kiwifruit exports in 1982 (May-October) were 4.6 million trays (17,032 metric tons) compared with 6.2 million trays (22,963 tons) in the previous year. Kiwifruit is shipped to over 30 countries, with West Germany ranked as the top foreign market taking 29 percent of all exports; followed by the rest of Europe, 28 percent; Japan, 27 percent; the United States, 8 percent and all others, 8 percent. Last year, New Zealand shipped approximately 5 percent of its exports by airfreight.

--Exports of flowers from Colombia in 1982 totaled 40,000 tons, valued at \$123 million, up from 37,000 tons and \$109 million in 1981. The United States was the dominant market taking 70 percent of exports, followed by West Germany (9 percent), the United Kingdom (5 percent), and Sweden (3 percent). Flower exports in 1983 are forecast to increase by 5 percent.

According to the Federal-State Market News Service, in 1982 U.S. cut flower imports from Colombia amounted to 679 million blooms, up 3 percent from 1981. Carnations represent 67 percent of total imports, roses 11 percent and pompons 8 percent. Carnation imports were down 2 percent, while imports of roses and pompons increased by 23 and 26 percent respectively.

--Maine potato farmers have filed a petition alleging dumping of Canadian potatoes in U.S. markets. On February 9, 1983, the Maine Potato Council, a trade association of Maine potato producers, filed a petition with the U.S. International Trade Commission (ITC) and the Department of Commerce alleging that imports of fall harvested round white potatoes from Canada are being sold in the United States at less than fair value and are causing or threatening to cause material injury to a U.S. industry. The ITC will rule on the material injury issue by March 28, 1983.

WORLD DECIDUOUS FRUIT AND TABLE GRAPE SITUATION

WORLD PRODUCTION

Favorable weather conditions during the 1982 growing season resulted in abnormally large deciduous fruit crops in many Northern Hemisphere countries.

The production increases in European Community (EC) countries, especially West Germany, were the most significant factors in the world production situation. Apple production is estimated to be up by 25 percent in 1982/83 ½/ in selected major producing countries around the world (table 1). The biggest factor in this increase was a tremendous jump in the West German crop. All other EC countries, except Greece, also registered large production increases in the wake of their poor 1981 harvests. The growth in world pear output was more modest. Italy, the United States and Spain—the world's largest producers of table grapes—all harvested larger crops in 1982 ½/. Cherry output in 1982 was up, largely because of bigger crops in West Germany and the United States. Peach and nectarine production in selected countries declined slightly because of frost damage to peach trees in the United States. The biggest factor behind the increase in plum and fresh prune output was the four-fold increase in the West German crop.

Forecasts for 1983 table grape and stone fruit crops in the major Southern Hemisphere producers are as follows (data in thousands of metric tons):

	Table : grapes :		:	: Peaches & : : Nectarines :	Plums & Prunes
Argentina Australia Chile New Zealand South Africa	190.0	20.0 31.0 14.5 33.0	4.0 7.0 	246.0 73.0 124.5 25.5 143.6	76.0 17.0 19.5 4.2 13.1
Total	379.4	98.5	12.7	612.6	129.8

⁻⁻ Indicates negligible or not available.

^{1/} For apples and pears the 1982/83 season refers to Northern Hemisphere crops harvested in the latter half of calendar year 1982 and Southern Hemisphere crops harvested in the early months of 1983.

^{2/} For table grapes, apricots, cherries, peaches and nectarines, and plums and prunes, 1982 refers to Southern Hemisphere production early in calendar year 1982 and Northern Hemisphere production later in 1982.

WORLD TRADE

Apple exports in 1982/83 are expected to be lower than last season's level. The decline is attributed to the big European crop which will limit import demand in that region, to continued weak economic conditions throughout the world, and to new import restrictions in developing countries. Shares of world apple exports in 1981/82, excluding intra-EC trade and trade among communist countries, were more or less (in percents): the Southern Hemisphere 53, the United States 19, the European Community 14, other Europe 9, and Canada 5.

World apple imports in calendar year 1981, again excluding intra-EC trade and trade among communist countries, were divided as follows (in percents): the European Community 30, other Western Europe 15, North America 10, and Developing Countries 45.

The Middle East and North Africa take close to one-half of the imports into the developing region with most of the remainder divided close to equally between Far Eastern and Latin American (including Caribbean) countries. Recently imposed import restrictions in many Latin American countries are likely to reduce the relative importance of markets in the region.

World pear exports declined slightly in 1981/82. Exports in 1982/83 are likely to be near last season's level. A poor crop in Italy has improved market prospects in Europe for other exporters.

Canada will continue to be a net importer of apples during the 1982/83 season, and the United States will be the largest supplier. During 1981/82, Canadian apple imports more than doubled the previous year's level, offsetting the large, weather-related crop loss in Ontario and Quebec. The United States supplied 87 percent of 1981/82 imports. South Africa, New Zealand, Chile, and France supplied the remainder.

In 1981/82 the United Kingdom and the United States were the largest markets for Canadian apple exports. Exports in 1982/83 could be down somewhat from last season because of less favorable conditions in the UK market. Through December, however, the decline in exports to the United Kingdom was compensated for by a large increase, from 1,300 tons to 5,700 tons, in shipments to Taiwan.

Traditionally, about 85 percent of apple exports from the EC countries are purchased by other member countries, but because of this year's large crops EC exporters—mostly France and Italy—are aggressively seeking to expand third country markets. The largest markets outside of the EC are in the Arabian peninsula, Iraq, Scandinavia and Austria. A further impetus to expand shipments is the export subsidy provided to EC members for exports to third countries. For apples destined to the Arabian Peninsula, Iraq, Iran and Finland the subsidy is approximately \$2.15 per 42—1b. carton (based on the February 3, 1983 exchange rate of 1 ECU = \$0.94). Prior to February 5, 1983, Hong Kong, Indonesia, Malaysia and Singapore were included on the list of beneficiary destinations for this subsidy. EC apple exports to Brazil, Venezuela, Peru, Panama, Ecuador, Norway, Sweden, Austria, and Iceland are entitled to a subsidy equal to approximately \$0.72 per 42—1b carton.

French apple exports to non-EC countries in 1982/83 will exceed the 96,000 tons exported last season. French apple exports to North America should climb substantially, partly because of the favorable franc/dollar exchange rate, with shipments to the United States projected at 8,000 to 10,000 tons compared to 2,400 tons in 1981/82. French exports to the Middle East reached 32,000 tons during August-December 1982, nearly double last year's comparable period. Most of these sales were to Arabian Pennisula countries. Most of France's exports of red apples go to the Middle East. Exports to the Far East and South American countries also increased substantially. EC subsidies by destination for French apple exports as a percentage of weighted average f.o.b. prices during August-November 1982 were: Saudi Arabia 29, North Yemen 27, Kuwait 24, Singapore 28, and Malaysia 31.

A decline is forecast for Italian apple exports. The Italian fruit trade is composed of over 3,000 exporting firms, a situation which is not conducive to a common quality policy. This is especially detrimental during the current season when a quality product is essential.

Ordinarily, re-exports account for about 40 percent of Dutch apple exports. Approximately 90 percent of apples imported from the United States are re-exported, mainly to West Germany and the Scandinavian countries.

The EC intervention program allows for the withdrawal from the market of certain quantities of apples when market conditions warrant. It is likely that over 700,000 tons will be purchased by the EC intervention agency in 1982/83. These apples are given to charities, used for feed, or destroyed.

In some years the EC limits imports of apples by negotiating "self-limitation" agreements with Southern Hemisphere suppliers. Such agreements, likely to be negotiated this season, could hold 1983 EC apple imports well below the estimated 380,000 tons imported from the Southern Hemisphere in 1982. Southern Hemisphere countries provide about 90 percent of EC imports from third countries. Another 6 percent or so is provided by the United States and Canada which ship mostly to the United Kingdom.

The outlook for French and Belgian pear exports in 1982/83 is favorable. Both countries intend to capitalize on the deficiency in pears created by the reduced Italian crop.

Spanish apple exports in 1982/83 are likely to total only 15,000 tons, down from 67,000 tons last season. This is a return to a more normal level, as the record 1981/82 exports were attributable to a good crop in Spain and poor production in the rest of Europe. Yugoslavia's apple exports have risen rapidly in recent years. Most exports are destined to Austria and to EC countries

Northern European countries reserve the early months of the apple and pear marketing seasons for domestic fruit. Imports are allowed only after an announced opening date. These opening dates in 1982/83 were as follows:

	Apples	Pears
Norway	December 13	November 25
Sweden	February 22	November 18
Finland	November 27	November 5

Closing dates in Norway are April 30 for apples and August 10 for pears. Import prospects in these countries, especially for U.S. fruit, are not encouraging because of good domestic supplies and unfavorable dollar exchange rates following recent devaluations in all 3 countries.

Given the increased export opportunities in Europe and North America, the 1982 apple exporting season was successful for most of the Southern Hemisphere's leading suppliers. Australia, troubled by a lack of quality fruit which fetched unattractive prices, was the exception. Southern Hemisphere 1982 apple exports by destination are estimated as follows:

•				_		DE:	STINATIO	N				
Origin :		:	South	:	North	:	Middle		Far	: Not	:	
:	Europe	:	America	:	America	•	East	•	East	:Specified	1	Total
•					Thouse	and:	s of Met	ri	c Tons	3		
Argentina:	125		105									230
South Africa:	182				20				5	15		222
Chile:	100		34		13		40			3		190
New Zealand.:	62		1		19		5		11			98
Australia:	14						3		15			32
•												
Total:	483		140		52		48		31	18		772
:												

The success of the Southern Hemisphere's 1983 apple exporting season is contingent upon shipments to non-European destinations. Chilean exporters—optimistic because of the devaluation of the peso--consider Latin America, Africa, and the Far East potential expansion areas. Attention is being shifted from the Middle East, a market Chile feels is becoming saturated.

Effective July, 1982, Argentina imposed a 10-percent tax on exports of fresh apples and pears. However, the government continues to encourage use of Patagonian (southern) ports by granting an 8 percent rebate for shipments from these ports. Argentine fruit exports to Brazil are via truck and are, therefore, ineligible for the rebate. Argentine apple exports in 1983 could be thwarted by Brazil's planned import restrictions. The Brazilian government has announced that will limit imports of Argentine apples to only 180,000 boxes (3,780 tons) monthly during April-August. Brazil generally purchases over 40 percent of Argentine apple exports.

South Africa achieved record fresh deciduous fruit exports in 1982, up 25 percent overall from the previous season. The good year was attributable to good crops in South Africa, the poor 1981 crops in Europe, and favorable exchange rates for the South African rand against European currencies. South Africa and New Zealand were pleased with their respective exports of Granny Smith apples to North America during 1982. In addition, New Zealand sold a substantial quantity of apples to Saudi Arabia last season. Attempts to maintain these markets will be made during 1983.

Australian exporters hope to expand shipments to the Middle East and Southeast Asia this Season. Singapore/Malaysia has become Australia's major non-European buyer of apples, receiving 11,130 tons in 1982.

Chilean table grape exports rose 36 percent in 1982, totaling 108,500 tons. Further increases are expected in 1983. Chile has been successful in expanding exports based on the steady increase in production. The major portion of the additional volume of table grapes will be exported to the United States. Southern Hemisphere 1983 exports of table grapes and fresh stone fruit are forecast as follows (data in thousands of metric tons):

Origin	Table grapes	Peaches & nectarines	Plums & prunes
Chile	125.0	11.2	3.8
South Africa	38.2	0.6	7.9
Argentina	1.5	2.0	1.5
Australia		0.4	2.0
Total	164.7	14.2	15.2

U.S TRADE

U.S. exports of apples declined by 10 percent in 1981/82 (table 4). Export earnings, however, were down only 6 percent to \$154 million. Lower sales to the Far East accounted for most of the decline. Sales to the two largest markets in the region, Taiwan and Hong Kong dropped dramatically. Sales to Arabian Peninsula countries were also down. A big boost in sales to Canada was not enough to compensate for these losses. Apple exports continued sliding during the first 7 months of the 1982/83 season. Sales levels to Far East markets were maintained, but exports to Canada were down.

U.S. pear exports in 1981/82 were up by 13 percent over the previous season and earned \$28 million, thanks to growth in the Canadian and South American markets. The trend has not continued into 1982/83 because of poorer sales to Canada and Mexico and the closure of the Brazilian market. Part of the decline may be the result of recently imposed stricter tolerance levels for the pesticide amitraz in Canada.

The United States exported \$95 million worth of fresh grapes in calendar year 1982. Canada accounted for 70 percent of the volume shipped. At least one-half of the grapes exported to Canada are used for wine making. The next largest market was Hong Kong which took 10,482 tons or 9 percent of total grape exports. Exports by region in 1982 were (in thousands of metric tons):

Canada	78.0
Latin America & Caribbean	6.4
Europe	1.9
Middle East	
Far East	22.3
Total	111.7

Earnings from U.S. exports of fresh cherries, peaches, nectarines and plums totalled \$52 million in 1982. Canada was the dominant market; but Japan took significant quantities of cherries; Hong Kong took cherries and plums; and Colombia and Venezuela took peaches, nectarines and plums.

U.S. sweet cherry exports to Japan during the 1982 shipping season were down 35 percent from the previous year, the first decline in U.S. shipments since the commencement of U.S. fresh sweet cherry exports to Japan in 1978. Among the reasons for the decline were plentiful supplies of other fresh fruit in Japan and wet weather before and during harvest in Washington State which adversely affected quality and export availability. In addition, higher export prices and the depreciation of the yen resulted in a 38 percent increase in the yen cost. Canada became eligible to export cherries to Japan during 1982, but poor weather caused cancellation of a planned trial shipment.

The United States imported \$134 million worth of fresh deciduous fruit and table grapes in 1982. Table grapes and apples accounted for over half of the import value. Most of the apples imported from France and Southern Hemisphere countries were Granny Smiths. Imports in calendar years 1981 and 1982 by countries of origin were as follows (data in thousands of metric tons):

		1981	1982
Apples:	Canada South Africa New Zealand Chile France Others Total	7.4 14.4 12.7 3.3	32.8 13.2 11.6 10.3 3.3 0.7 71.9
Pears:	Chile	. 5.6 . <u>1.4</u>	5.8 2.1 1.7 9.6
Grapes:	Chile	7.4 1.2 0.2	75.9 16.2 2.4 0.6 95.1
Peaches & Nectarines	:Chile Others Total	0.2	5.5 0.3 5.8
Plums:	ChileOthersTotal	0.1	1.6
Cherries:	Total	. 0.1	0.1

APPLE JUICE

Processors in the countries covered by this report (table 1) utilized 3.3 million tons of apples in 1981/82, down 21 percent from 1980/81—the result of smaller crops in North America and the European Community. A sharp increase in processing is anticipated in 1982/83.

In the EC, demand from the apple processing sector is active because low priced raw fruit permits increased production, particularly of juice, for which consumption in the EC is rising. West Germany is taking a commanding lead over other EC apple processors. The amount of West German apples destined for processing during 1982/83 is projected to reach 971,000 tons, a seven-fold increase over the previous season.

Argentina's 1982 concentrated apple juice (CAJ) production is estimated at 27,700 metric tons at $70^{\circ}/71^{\circ}$ brix (equivalent to about 164 million liters, single strength). Practically all of Argentina's output is exported to the United States. There were reportedly no carryover stocks at the end of the year. It is expected that 1983 production will decline somewhat because of the smaller apple crop.

In the United States 55 percent of apples for processing are used for juice. The United States is also the largest importer of apple juice, especially apple concentrate. Imports in 1982, which accounted for about 40 percent of total availability (excluding stocks), were 393 million liters (104 million gallons), single strength equivalent (equal to about 66,000 metric tons of $70^{\circ}/71^{\circ}$ brix concentrate) valued at \$92 million. U.S. imports of apple juice $\frac{1}{2}$ by country of origin in calendar years 1981 and 1982 were as follows (data in millions of liters, single strength equivalent $\frac{2}{2}$):

Argentina. West Germany. South Africa. Netherlands. Spain. Austria. Mexico. New Zealand. Israel. France. Chile. Canada. Portugal. Hungary. India. Yugoslavia. Others.	1981 153.6 25.4 45.5 11.2 12.5 3.3 9.2 9.9 7.1 5.6 8.1 5.4 0.7 1.4 1.1 2.3 6.6	1982 158.8 54.0 41.3 30.4 30.1 14.3 11.5 11.1 8.4 7.4 6.1 5.0 3.9 2.3 2.3 1.4 4.5
Total	308.9	392.8

^{1/} Includes a small amount of pear juice. 2/ 1 liter=0.2642 gal.

SOURCE: U.S. Department of Commerce, Bureau of Census.

Argentina supplied 42 percent of U.S. apple juice imports in 1982, down from 53 percent the previous year. European countries upped their share of the import market from 21 percent in 1981 to 37 percent in 1982. In 1982, 74 percent of U.S. apple juice imports were disembarked at East Coast ports and 16 percent at West Coast ports.

Table 1 APPLES: PRODUCTION, EXPORTS AND PROCESSING IN SELECTED COUNTRIES $\frac{1}{2}/$ 1980/81-1982/83 $\frac{2}{2}/$ (1,000 Metric Tons)

Continent and County		PRODUCTION			EXPORTS			PROCESSED	
Continent and Country	1980/81	: 1981/82	1982/83 3/	1980/81	1981/82	: Forecast : 1982/83		1981/82	: Forecast : 1982/83
North America									
C da 4/	553	419	461	77	70	60	240	190	200
Mexico	282	280	180		~~		16	20	15
United States 4/	4,005	3,517	3,724	305	274	255	1,755	1,475	1,600
Subtotal	4,840	4,216	4,365	382	344	315	2,011	1,685	1,815
urope			•						
EC									
Belgium-Luxembourg 4/	330	134	263 :	70	66	65	66	20	53
Denmark 4/	63	43	67 :	10	6	12	15	15	15
France <u>5</u> /		1,468	1,895 :	715	628	650	130	120	135
Germany, Fed. Rep. of		773	2,775 :	25	27	15	499	127	971
Greece		300	257	18	15	10	35	18	15
Italy		1,773	2,223 :	277	490	300	240	215	270
Netherlands 4/	450	260	410 :	165	153	150	90	70	70
United Kingdom 5/	321	227	354	14	11	14	120	60	100
Subtotal	7,074	4,978	8,244	1,294	1,396	1,216	1,195	645	1,629
ther Europe Austria 5/	240	186	316				81	52	105
Norway		54	44				8	10	103
Spain 5/		1,007	847		67	15	40	50	42
Sweden 4/		29	43			10	5	7	5
		83	130						
SwitzerTand 4/ 5/	483	508	667	10	62	80	128	126	227
Subtotal	1,776	1,867	2,047	10	129	95	262	245	387
otal Europe	8,850	6,845	10,291	1,304	1,525	1,311	1,457	890	2,016
sia Japan	960	846	927	2	1	3	119	140	150
Japan							117	140	
outhern Hemisphere									
Argentina	908	804	730 :	227	230	180 :	370	340	330
Australia		330	300 :	53	32	38	87	73	85
Chile		345	350 :	187	190	200	12	15	20
New Zealand		220	250 :	99	98	118 :	72	64	73
South Africa	450	517	505 :	168	222	197	117	129	133
Subtotal	2,231	2,216	2,135	734	772	733	658	621	641
rand Total	16,881	14,123	17,718	2,422	2,642	2,362	4,245	3,336	4,622

⁻⁻ Indicates negligible or not available.

SOURCE: Crop Reporting Board and U.S. Department of Commerce, Bureau of Census for United States. Reports from U.S. Agricultural Counselors and Attaches or USDA estimates for all other countries.

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^{1/} May include some cider varieties in countries not reporting separately. 2/ Crop year refers to July-June period for Northern Hemisphere countries; for Southern Hemisphere countries harvest and marketing occurs entirely during the second year shown. 3/ Preliminary. 4/ Commercial crop. 5/ Excludes cider apples.

Table 2

PEARS: PRODUCTION AND EXPORTS IN SELECTED COUNTRIES 1/
1980/81-1982/83 2/
(1,000 Metric Tons)

	PRODUCTION			EXPORTS			
Continent and Country	1980/81	: 1981/82 :	1982/83	1980/81	1981/82	1982/83	
Jankh Onania				:			
North America Canada 4/	39	32	34	1	1	1	
Mexico		31	35	:			
United States 4/		814	731	: 46	52	41	
				• 47	53	42	
Subtotal	899	877	800	: 47	, , , , , , , , , , , , , , , , , , , ,	42	
Europe				:			
EC				:			
Belgium-Luxembourg 4/	75	58	94	: 31	18	40	
Denmark 4/	4	6	5	: 1		1	
France <u>5</u> 7	413	428	410	: 90	79	90	
Germany, Fed. Rep. of	394	276	568	: 4	8	5	
Greece		115	96	: 3	4	3	
Italy	1,342	1,237	1,080	: 163	171	130	
Netherlands		90	105	: 56	45	45	
United Kingdom 5/		49	44	2	1	1	
Subtotal	2,488	2,259	2,402	350	326	315	
Subtotal	2,400	2,200	2,402	. ,,,,	720		
Other Europe				•			
Austria <u>5</u> /		32	55	:			
Norway		10	8				
Spain <u>5</u> /		525	454	: 28	25	18	
Sweden		6	5				
Switzerland 4/ 5/	19	15	20	:			
Yugoslavia	115	137	169	:	5	10	
Subtotal	605	725	711	28	30	28	
Total Europe	3,093	2,984	3,113	378	356	343	
0.2				•			
Asia Japan	496	487	525	9	10	11	
				:			
Southern Hemisphere				:			
Argentina	130	138	140	: 36	63	64	
Australia	146	117	140	40	18	28	
Chile	42	43	43	: 22	26	25	
New Zealand	18	17	17	1 3	2	2	
South Africa	123	115	117	: 47	46	51	
Subtotal	459	430	457	148	155	170	
Grand Total	4,947	4,778	4,895	582	574	566	

⁻⁻ Indicates negligible or not available.

SOURCE: Crop Reporting Board and U.S. Department of Commerce, Bureau of Census for United States. Reports from U.S. Agricultural Counselors and Attaches or USDA estimates for all other countries.

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^{1/} May include some cider varieties in countries not reporting separately. 2/ Crop year refers to July-June period for Northern Hemisphere countries; for Southern Hemisphere countries harvest and marketing occurs entirely during the second year shown. 3/ Preliminary. 4/ Commercial crop. 5/ Excludes cider apples.

Table 3 PRODUCTION AND EXPORTS OF SPECIFIED FRUIT IN SELECTED COUNTRIES, 1980-82 $\frac{1}{2}\prime$ (1,000 Metric Tons)

Commodity and Country	1980	PRODUCTION: 1981		1980 :	EXPORTS 1981 :	1000 0
Commodity and Country	1700	. 1701	1982 <u>2</u> /	1960	1981 :	1982 2
ADI E COADEC						
ABLE GRAPES Northern Hemisphere						
EC Total	1,917.1	1,866.4	1,991.5	472.6	518.1	484.7
France	185.3	167.9	171.7	27.5	23.2	24.8
Greece		263.0	249.8	60.7	88.6	84.9
Italy	1,478.8	1,435.5	1,570.0 :	384.4	406.3	375.0
3			:			
Japan		309.9	355.8 :		277	
Mexico 3/		577.0	530.5	10.5	8.0	17.0
United States		494.0 477.4	543.0 : 618.5 :	65.7	81.0 111.8	70.0
Yugoslavia 4/		195.0	240.0	12.0	10.0	20.0
			21010	1210	1010	20.0
Subtotal	3,889.3	3,919.7	4,279.3	678.7	728.9	703.3
Southern Hemisphere						
Argentina		114.0	113.0	1.0	0.7	1.5
Chile		127.7	162.4	49.8	79.8	108.5
South Africa	70.1	62.2	73.3	36.1	29.7	37.3
Subtotal	315.1	303.9	348.7	86.9	110.2	147.3
Creed Total	4 204 4	4 007 (4 600 0	7/5 /	030 1	050.6
Grand Total	4,204.4	4,223.6	4,628.0	765.6	839.1	850.6
PRICOTS						
Northern Hemisphere						
Canada		2.0	3.2	77.0	77 7	7/ 0
EC Total		323.7	300.5	37.8 1.5	33.7	36.8
FranceGreece		85.2 104.9	71.0 : 84.5 :	28.5	2.1 26.3	1.3 26.5
Italy		133.6	145.0	7.8	5.3	9.0
,						
Austria	13.3	6.2	18.3			
Spain		174.0	177.0	14.6	29.0	23.0
United States		81.1	102.4			
Yugoslavia	24.0	30.0	32.0	0.1		
Subtotal	533.1	617.0	633.4	52.5	62.7	59.8
Southern Hemisphere		10.7	10.1			
Argentina		10.7	19.1			
Australia		30.6	26.0			
Chile		13.0	14.2			0.2
South Africa	38.1	32.7	36.7	0.2	0.2	0.2
Subtotal	99.1	87.0	96.0	0.2	0.2	0.2
Subcocar	27.1	07.0	70.0	0.2	0.2	0.2
Grand Total	632.2	¿ 704.0	729.4	52.7	62.9	60.0
HEDDIES						
Northern Hemisphere						
Canada	19.1	10.2	14.0	7.0	4.5	5.0
EC Total		404.7	580.6	29.7	31.4	34.1
Belgium-Luxembourg	10.8	9.6	12.0 :			
France		83.0	112.4	12.2	10.4	15.5
Germany, Fed. Rep. of		117.5	293.6	1 7	7 6	1 6
Greece		27.5 167.1	22.6 140.0	1.3 16.2	3.5 17.5	1.6 17.0
Italy	1,74.2	10/.1	140.0	10.2	11.0	17.0
Austria	27.0	15.4	28.6	0.1	0.3	0.1
Japan		12.8	15.4			
Spain	71.0	76.0	73.0	0.5		
Switzerland	27.5	14.3	33			
United States	254.7	199.3	285.1	8.9	8.7	9.1
Yugoslavia	95.0	150.0	135.0	3.5	5.0	5.0
Subtotal	1,027.5	882.7	1,131.7	49.7	49.9	53.3
Southern Hemisphere					0.0	
Australia	7.3	6.5 5.9	5.3 6.4	0.2	0.2 0.7	0.1 0.7
Subtotal	12.6	12.4	11.7	1.0	0.9	0.8
Grand Total	1,040.1	895.1	1,143.4	50.7	50.8	54.1

⁻⁻ Indicates negligible or not available.

SOURCE: Crop Reporting Board and U.S. Department of Commerce, Bureau of Census for United States. Report from U.S. Agricultural Counselors and Attaches or USDA estimates for all other countries.

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^{1/} Calendar years Southern Hemisphere harvest begins in January or late in the previous year.
Northern Hemisphere harvest begins in April or later. 2/ Preliminary. 3/ Total grape production.
4/ Production figure shown is 15 percent of total grape production which is estimated to be roughly equivalent to table grape production.

Table 3 (Continued)

PRODUCTION AND EXPORTS OF SPECIFIED FRUIT IN SELECTED COUNTRIES, 1980-82 ½/ (1,000 Metric Tons)

•		PRODUCT	ION	:	EXPORTS	
Commodity and Country	1980	1981	: 1982 <u>2</u> /	1980	1981 I	1982 <u>2</u> /
PEACHES AND NECTARINES :				•		
Northern Hemisphere :						
Canada	40.9	27.3	38.0			
EC Total	2,269.6	2,458.0	2,495.9	413.1	429.3	403.5
France	460.2	482.0	436.0	34.4	29.5	20.8
Germany, Fed. Rep. of	26.7	11.2	36.9			
Greece	398.6	433.0	453.0	94.7	63.9	77.7
Italy:	1,384.1	1,531.8	1,570.0	284.0	335.9	305.0
Austria	13.9	8.7	17.2	:		
Japan	244.6	238.8	267.4			
Mexico	172.1	203.5	189.0			
Spain:	390.0	441.0	463.0	: 15.2	19.0	17.0
United States	1,570.2	1,427.3	1,196.9	28.5	35.4	31.0
Yugoslavia	92.0	80.0	90.0	0.6		
				:		
Subtotal	4,793.3	4,884.6	4,757.4	457.4	483.7	451.5
Cauthan Umish				:		
Southern Hemisphere :	070 0	200 0	017.0			
Argentina	238.0	222.0	213.0	:		
Australia	71.5	79.2	63.1	: 0.4	0.4	0.4
Chile:	114.6	110.7	121.4	: , 9 . 7	9.2	10.5
New Zealand:	20.7	23.0	24.7	:		
South Africa:	194.9	142.9	144.9	: 0.6	0.4	0.5
Subtotal	639.7	577.8	567.1	10.7	10.0	11.4
				:		
Grand Total	5,433.0	5,462.4	5,324.5	468.1	493.7	462.9
PLUM AND PRUNES (FRESH) :				:		
Northern Hemisphere :				:		
Canada	9.5	5.9	11.0	•		
EC Total	904.2	521.2	1.066.4	48.5	48.0	38.3
France	141.7	158.0	191.2	8.3	15.8	12.3
Germany, Fed. Rep. of:	535.1	169.2	672.8	7.1	2.2	2.0
Italy	183.9	178.5		33.1	30.0	24.0
United Kingdom	43.5	15.5	32.4		70.0	24.0
:	00.0	10.5	106.0			
Austria:	90.9	40.5		: 0.2	-	
Norway	10.5	15.8	12.0			
Spain	90.0	105.0	, , , ,	: 21.5	23.0	18.0
United States	746.8	702.6	524.4	21.7	26.9	20.5
Yugoslavia:	666.0	816.0	995.0	2.0	10.0	20.0
Subtotal	2,517.9	2,207.0	2,812.8	07.0	107.0	06.0
Subtotat	2,017.9	2,207.0	2,012.8	93.9	107.9	96.8
Southern Hemisphere :				•		
Argentina	69.0	72.0	68.0	1.0	1.0	1.0
Australia	17.6	20.8	19.7		1.0	1.0
Chile	17.0	17.2	15.4	1.9	1.9	1.8
New Zealand	3.8	4.0		3.4	3.1	3.5
South Africa	12.1	10.0	4.3 12.7	5.6	5.0	7.2
:						
Subtotal	119.5	124.0	120.1	11.9	11.0	13.5
Grand Total	2,637.4	2,331.0	2,932.9	105.8	118.9	110.3
Indicates negligible or not ava						

⁻⁻ Indicates negligible or not available.

SOURCE: Crop Reporting Boaro and U.S. Department of Commerce, Bureau of Census for United States. Report from U.S. Agricultural Counselors and Attaches or USDA estimates for all other countries.

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 $[\]frac{1}{N}$ Calendar years. Southern Hemisphere harvest begins in January or late in the previous year. Northern Hemisphere harvest begins in April or later. $\underline{2}/$ Preliminary.

Table 4

UNITED STATES, EXPORTS OF APPLES AND PEARS, 1980/81 AND 1981/82 1/ (Metric Tons)

Donier and O		oples		ars
Region and Country	1980/81	: 1981/82	: 1980/81	: 1981/82 :
Canada	: 30 469	CE 070	17 706	07 (70
		65,979	17,385	23,638
lexico	: 9,425	4,827	3,271	4,038
Central America	: 6,337	5,559	786	568
Caribbean	: 7,691	6,425	681	856
South America	:			
Colombia		7,552	752	1,053
Venezuela	: 14,711	19,823	4,678	5,639
Brazil		3,018	1,600	3,404
Other	: 5,994	1,755	352	5
Total	00 577	70.140	7 700	10, 101
Total	: 29,573	32,148	7,382	10,101
uropean Community	:			
United Kingdom	: 14,352	12,008	123	88
Netherlands		2,406	814	329
Other		2,174	466	307
Total	20,484	16,588	1,403	724
ther Western Europe	:			
Iceland	: 1,163	1,730	0	25
Norway	· .	6,355	1,409	1,300
Sweden		6,376	7.246	4,337
Finland		4,956	289	57
	:			
Total	18,297	19,417	8,944	5,719
uiddle East				
Kuwait	2,932	1,252	417	190
Saudi Arabia		21,967	1,916	3,162
United Arab Emirates		12,909	2,556	1,569
Other		592	154	477
other	: 1,200	272	1)4	4//
Total	47,450	36,720	5,043	5,398
10001	7, -50	50,720	3,043	
ar East	:			
Malaysia	: 4,138	5,381	14	26
Singapore	: 8,518	7,974	393	219
Indonesia	: 3,707	5,054	8	4
Hong Kong	: 28,669	19,328	304	315
Taiwan		37,232	0	0
Other	2,493	2,172	1	3
Total	121,690	77,141	720	567
10001.	:	. , , ,	, 20	
ceania Australia	320	5,679	4	0
			360	533
New Zealand		1,957		
Other	: 878 :	377	102	57
Total	: : 3,318	8,013	466	590
frica	1,695	910	31	28
otal World	305,428	273,727	46,112	52,227

^{1/} Years beginning July 1.

HORTICULTURAL MARKETS

U.S. HORTICULTURAL EXPORTS TO JAPAN

Despite the Medfly crisis which temporarily stunned fresh fruit shipments from California, U.S. horticultural exports to Japan crept up 3 percent to a record \$479 million in the 1981/82 fiscal year (FY 1982) ending September 30, 1982. Sharply higher sales of fresh onions, canned corn, and frozen french fried potatoes were primarily responsible for the overall export gains, more than offsetting a 7-percent drop in the value of fresh fruit sales.

Although fresh fruit exports are expected to recover in the current fiscal year (FY 1983), a setback in the upward trend in total horticultural exports to Japan appears likely at this time. For the first three months (October-December) of the current year, total exports were off 25 percent to \$101 million, largely because two bright stars of a year ago---onions and canned corn---suddenly dimmed. Fresh onion exports have been minimal because of a rebound in Japanese production. A larger Japanese canned corn pack, heavy inventories in Japan, the strength of the dollar against the yen, and sluggish economic conditions have combined to cut canned corn exports by over 50 percent.

The Mediterranean fruit fly (medfly) infestation in California, which first occurred in mid-1980, began having a major adverse influence on fresh fruit exports when the pest edged into California's San Joaquin Valley in August 1981. Japan reacted immediately, requesting USDA to withhold phytosanitary certificates for fruit and "fruit-type" vegetables destined for Japan from California. Produce from outside the regulated areas in the State could only be exported to Japan if treated in accordance with approved fumigation or cold treatments. This resulted in a virtual standstill in exports to Japan because of the lack of approved treatments and fumigation facilities. Lemons, strawberries and melons were among the key products affected.

In spite of repeated efforts by USDA to convince Japanese authorities of the biological soundness of the medfly control program, they did not loosen the import restrictions until January 1982 by exempting lemons from the treatment requirements. As USDA and State plant quarantine authorities gained greater control over the infestation, Japan further relaxed its restrictions, finally eliminating them entirely when eradication of the Medfly was declared on September 21, 1982.

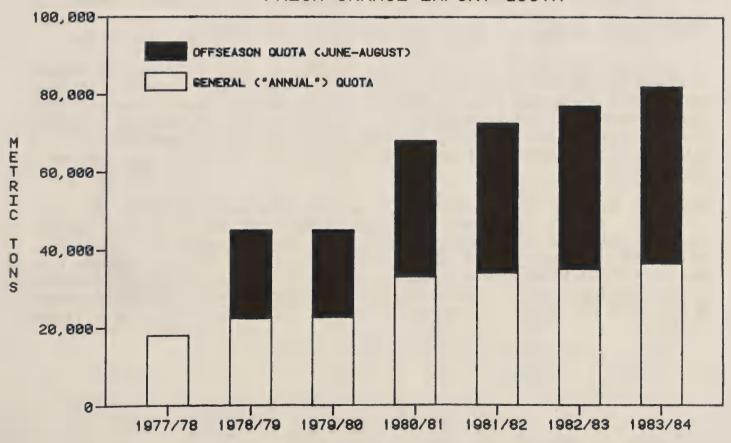
The Medfly crisis offers a striking but unfortunate example of the trade damage that can result from plant quarantine measures invoked to prevent the spread of insects or plant diseases. Japan has a reputation for strictly enforcing such measures, with a general belief among exporters that this enforcement is carried beyond what is necessary for biological reasons. Head lettuce, for example, is permitted entry into Japan. However, imports are fumigated with hydrocyanic acid on arrival for control of aphids even though aphids are present in Japan. This fumigation effectively destroys the marketability of the lettuce, forcing U.S. shippers to export only shredded lettuce which is not subject to fumigation (provided no insects are found).

U.S. fresh fruits and vegetables barred entry into Japan for plant quarantine reasons include cabbage, carrots, peppers, potatoes, tomatoes, apples, pears, apricots, nectarines, peaches, plums, and inshell walnuts. For the above fruits and walnuts, the occurrence of the codling moth in the United States is the primary reason for their exclusion. The moth can also infest cherries but an effective fumigation treatment, developed after seven years of research and negotiation, enables shippers in the Northwest states to export fresh sweet cherries to Japan. A July 1 entry date precludes participation by California shippers. California cherries are harvested in May/June which coincides with Japan's cherry harvest.

The most highly publicized Japanese barriers to U.S. horticultural exports are the residual import quotas on fresh oranges and orange juice and grapefruit juice. Japan has made significant progress in enlarging these quotas in recent years. But their continued existance shackles U.S. exporters and potential Japanese importers, and is a major irritant in US/Japan trade relations.

The fresh orange quota was enlarged from 18,000 tons to 45,000 tons in 1978/79 as a result of the Strauss-Ushiba Understanding of January 1978. Half of this 45,000 ton quota was restricted to imports during the "off-season" defined as the months June through August. Imports under the remaining general quota were not restricted by month. Further enlargement of the fresh orange quota occurred as a result of the Tokyo Round of the Multilateral Trade Negotiations. The following graph shows the evolution of these quotas since 1978.

EVOLUTION OF JAPAN'S FRESH ORANGE IMPORT QUOTA



For the 1983/84 Japanese fiscal year beginning this April, the total orange quota of 82,000 tons comprises an offseason element of 45,500 tons and a general quota of 36,500 tons. The situation after 1983/84 awaits negotiations with Japan. Japanese citrus growers have already begun a series of organized demonstrations, as well as petition drives, to influence the Japanese government to hold the line against U.S. demands for liberalization. The fears of Japanese growers as reflected in the demonstrations are basically unwarranted, and appear to be meeting an increasingly skeptical audience in Japan. Even if imports of oranges were to double under liberalization, they would still represent only 5 percent of the total annual supply of oranges in Japan. Available evidence suggests that Japanese mikan oranges (satsumas) would continue to be very competitive with imports. The losers under liberalization would be the quota holders who are in a position to extract large profit margins and to manipulate supplies to their advantage.

The orange juice and grapefruit juice quotas for 1983/84 will be 6,500 tons and 6,000 tons respectively (5 to 1 concentrate basis). The United States is by far the major supplier of grapefruit juice under the quota but has become a small, residual source for orange juice. This is largely the result of a requirement that imported orange juice be blended with Japanese juice. Under this arrangement, price considerations overwhelm quality factors, strongly favoring Brazilian juice.

Other horticultural products subject to import quotas in Japan include apple juice, grape juice, canned pineapple, fruit puree and pastes, and tomato sauce. Japan has shown the same reluctance to bring these restrictions into conformity with international trading rules as with the citrus quotas.

Fresh grapefruit and lemons were both liberalized in the early 1970's. Since then Japan has become the largest market for U.S. exports, purchasing a total of over \$100 million worth annually. U.S. exports to Japan dropped by slightly over 10 percent in FY 1982, primarily because of sluggish economic conditions, a freeze in Florida, and the medfly infestation in California.

In contrast, the volume of U.S. almond exports to Japan increased 25 percent to almost 12,000 tons in FY 1982. Their total export value, however, declined because of a 35-percent drop in the average unit value. The California Almond Growers Exchange, a participant in the FAS market development program, strongly promotes the visibility and use of U.S. almonds in Japan based on the well-founded conviction that Japan has the potential to become a major world almond market.

Other FAS cooperators who maintain a strong promotional presence in Japan include the Florida Department of Citrus (fresh grapefruit), Sunkist Growers (fresh citrus), the Cling Peach Advisory Board (canned peaches and fruit cocktail), the California Table Grape Commission, the California Avocado Commission, the California Raisin Advisory Board, the Papaya Administrative Committee, and Sun-Diamono Growers (prunes and walnuts). Also, the Potato Board is expanding its promotional efforts to further stimulate sales of U.S. frozen potatoes.

Commodity	: 1981 <u>1</u> / :	1982 <u>1</u> /	1981 1/	1982 1/
	:Metri	c Tons	\$1,0	00
Fresh Fruit	: 368,722	342,694	199,728	186,500
Grapefruit	: 158,840	140,759	59,754	
Lemons	110,040			47,795
Oranges	: 119,186	104,668	69,985	64,372
Oranges	: 71,641	83,100	41,279	50,929
Avocadoes	: 1,397	652	3,881	1,270
Cherries, Sweet	: 2,549	1,414	5,254	3,535
Grapes	: 1,465	1,483	2,100	1,923
Melons	: 3,586	2,298	2,179	1,588
Papayas	: 2,580	2,842	3,707	3,576
Strawberries				
Jelawbellies	: 1,079	1,095	3,779	3,946
Canned Fruit	17,950	19,874	16,399	18,202
Cocktail		3,704	2,907	3,317
Peaches		10,690	7,603	7,901
	:			
Oried Fruit		22,671	40,727	35,414
Prunes	: 5,8111	6,947	6,667	8,141
Raisins	: 17,981	15,478	32,547	26,023
rozen Fruit	4,619	6 400	5 266	7 450
Rluebannias	4,017	6,488	5,266	7,452
Blueberries		1,940	951	1,500
Stidwbeilies	: 1,549 :	1,715	2,062	2,636
ruit Juice <u>2</u> /	9,557	11,007	17,080	18,321
Citrus		6,004	10,048	8,312
Non-Citrus	2,759	5,063	7,032	10,009
	:			
Fresh Vegetables	: 39,644	80,986	17,623	34,136
Asparagus	: 949	1,132	3,642	4,181
Onions		78,407	12,899	29,022
	:			
Canned Vegetables		33,616	23,192	28,139
Corn	: 22,722	29,067	16,518	23,927
Erozon Vecetobles	: : 77,682	78,145	50,430	57,670
Frozen Vegetables				
Corn		23,561	16,856	17,655
Potatoes, FF	: 28,342	32,268	18,591	24,560
Dehydrated Vegetables	22,310	23,414	21,851	24,148
		2,313	4,350	5,520
Onions		20,448	15,804	16,599
	:	20, 440	15,004	
ree Nuts	: 11,409	12,741	43,768	36,682
Almonds, shelled		9,142	29,591	24,419
Almonds, prepared		2,518	9,688	8,153
		448	1,248	1,648
Walnuts, shelled	:	740	1,240	1,040
ther			26,589	31,872
Hops		300	2,552	1,234
Nursery Stock			2,546	3,320
-		3,337	2,637	2,970
Soups	·			
Sauces		826	1,273	3,101
Wines 2/		255	1,786	1,791
Blended Foods NEC	1,242	1,243	5,488	5,093
Total			462,653	478,536
IULGIaaaaaaaaaaaa			7021000	7/0,770

^{1/} Fiscal year ending September 30. 2/ Volume in 1,000 gallons.

JANUARY A		WITH COMPARIE	ONS CANDARY		CHANGE FROH 1982	2	SELECTED HORTICE	SELECTED HORTICULTURAL PRODUCTS QUANTITY OF U.S. EXPORTS: JANUARY AND SEASON-JANUARY 1983, WITH CO	GUANTITY 1983, WITH	OF U.S. EXP	ORTS	CHANGE	
BEGINNING OF SEASON :-	1982 : 1983	1982	198		JAN:BO	1-	COMMODITY/COUNTRY :- AND AND BEGINNING OF SEASON :	J982 :	1983	SEASON- 1982	JANUARY 1983	CAN:BOS-	
PLES FRESH JULY 1		TON			PERCENT	E	••		IN METRI	S 10NS)		PERCENT	
TOTAL EC-TEN-00000000000000000000000000000000000	1,307					8	CANADA	130844	16.344	39.732	36.181	+18	
GERMANY, FED. REP.	17 31		110	31	-100 -100	· M C	FRANCE	229	174	240	238	+131 +131	
IRELAND	104						SERMANY FED. REP	32	8	42	12	-100	
UNITED KINGDOM	362						UNITED KINGDOM		1	16	CH	-100	
OTHER EUROPE	1.222						FINLAND		80 11	1	01	:	
NORWAY	2,477 2,099	99 5.701		5,307	-84 -24	* ^			00.7	22	502	-100 -100	
OTHER	172			•256		an co	TOTAL EUROPE	230	268	262	582	+147	
LATIN AMERICA	7,280			.930		v 45	BERMUDA AND CARIBBEAN		117	370	334	7	
BERMUDA AND CARIBBEAN.	1,021			.701 .		4	JAPAN		3,007	8,655	7.705	4 4 4 4 4 4	
HONG KONG	30 0 4 2 30 6 3 4			*395			HODE D TOTAL		4,886	7,233	9,678	+23	
DOBLO TOTAL	8.181			924					20000	66993	10001	22.	
	34,908			,531			CANADA PARSH (204 1)		370	708	6		
CANADA COULY 1000000000000000000000000000000000000							TOTAL EC-TEN	99	88	0 et e	80		
TOTAL EC-TEN							TRANSFER OF THE PROPERTY OF TH	! *	! "	9 1 2 7	!:		
GERMANY, FED. REP	120	306		2/2	-100 -100		GERMANY. FED. REP		' :	1	=		
NETHER LANDS				177			UNITED MINGDOMANA AND AND AND AND AND AND AND AND AND	22	1 6	172	200		
UNITED KINGDOM				1 80 1			OTHER EUROPE			3			
FINLAND				900			OTHER	1 14	1 1	4			
NOREAY				101			TOTAL EUROPE	75	29	626	61	-61	
THUR THE COLUMN TO THE COLUMN							BERMUDA AND CARIBBEAN	88 1	80 F	271	0 11	-94	
ATIN AMERICA							HONG KONG		~		1	:	
ERMUD AND CARIBBEAN	168 33				-47 -3		OTHER COUNTRIES.	1	0 1	108	111	000 + 000 1001	
THER COUNTRIES.							WORLD TOTAL	A 553	518	1=732	10132		
MORLD TOTAL		4 40.636		28,339	-45 -30		GRAPEFRUIT. FRESH (SEPT 1)						
PES+ FRESH (JUNE 1)							TOTAL ECTENSSOSSOSSOSS	5,242	5,127	35.488	20,093	- M - 63 +133 +15	
OTAL ECHTEN				414			BELGIUM-LUX	(C)	173	166		-50	
GERMANY FED. REP.	921 752	F 64 8		590	-49 +19		GERMANY FED. REP	30026	11,341	16,756		+275	
MARITANDO O O O O O O O O O O O O O O O O O O				23 -1			ITALY		180	240			
NETHERLANDS				203			UNITED KINGDOM	2,0999	2,027	13,411		-25	
CNATEU MANGEDOM				- 602			OTHER EUROPE	:					
FINLAND							NORWAY	- :	00 1	101	220	:	
NORMAYOUR				150 -			SEDEN	114	198		599	+7+	
01HER					-61 -34		TOTAL FUROPE	F. 015	15.075		266	-28	
TAL EUROPE							LATIN AMERICA				14	121	
RHUDA AND CARIBBEAN							HONG KONG	7 22	2		80 16	-100	
PAN KONGOOOOOOOOOOO			_				CAPANOSOSOSOSOSOSOSOSOSOSOSOSOSOSOSOSOSOSOS	11,781	17,218	32,891	42,592	9	
THER COUNTRIES.	1,247 869	120379	_	10273 -	-40 +11		WORLD TOTAL	24,265	502	90,587	1050472	+69 +44	
			30				LEMONS. FRESH CALIG 33						
							CANADA	1,262	1,293	7,425		*	
							BELGIUM-LUX	298	1,695	90742	2,975	+72	
							DENMARK	17		40		-100 -50	
							GERMANY FED REPosses	203	10623	2,511	20,753	+699	
							NETHERLANDS	604	72	2,075		-82	
							OTHER EUROPE	6		701		-100	
							SOREN	1 0	167	96	11	100	
							OTHER	2	1 1	17	20.	-100	
							LATIN AMERICA	1,537	1,863	11,342	3,726	+21	
							BERMUDA AND CARIBBEAN.	-	•	*5	72	-100	
							CANTO SOCIO DE CONTRACTO DE CON	7,225	13,201	2,056	50,861	+64 +2	
							WORLD TOTAL	10.687	17,740	67.361	1.861	•191	
9 9							FEBRUARY 1983		BORTICU	LIVEAL AND THE	STOAL BESTVETT	DIVIS	Ambr
1983	DITTO	BORTICULTURAL AND TO	THIRTIES PROBO	AIG DIA	CARTE DIVISION, FAS/USDA	S/USDA							

EXPORTS. : CHANGE	JANUARY : JAN:BOS-: 1983 : JAN:BOS-:	PERCENT	251 -56	216	101 -100	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	72	122 +61	119	910 -68	287 +52	257 -19	20422 -40		1,727 +1	417 +36	572	123 -100	4,793 -14	1.860 +33	1.904 +31	1,622 +35	18+131 +29 -8 1-572 -88 -42	257 -57	2.634 -30	29.263 +5		4.083 -2	419 -37	361 -41	515 -50 -26	522 -73	533 -45	395 -29	2.096	174 -19 -56 5.379 +35 +E	24,426 +18							TH DIVISION, FAS/USDA		
OF U.S.	SEASON- 1982	FIRIC TONS)		3									153 610 519 3,201				106 980						1.855 19.661		247 2409						87 692					55 399 964 5.001								NAL AND TROPICAL PARTOTTI		
AAL PRODUCTS : GUANIIIY AASOM-JAMMARY 1983, WITH GA	JANUARY 1982 : 1983	2	92	130	2.0	111	31	23	!!	93	2 7	70	156 535										1.442								174					68 713								HORTICULTURAL A		
M. T. BORTICULTU	COMMODITY/COUNTRY AND BEGINNING OF SEASON :		CANADA	TOTAL EC-TEN	TOTAL STATE OF STATE	GUNANE CONTRACTOR OF CONTRACTO	I TALY OF SOUR SOUR SOUR SOUR SOUR SOUR SOUR SOUR	UNITED KINGDOM	NEMDEN SESSOS SE	TOTAL EUROPE.	BERMUDA AND CARIBBEAN	HONG KONGOOOOOOOOOOOOOOOOOOOOOOOOOOOOOOOO	WORLD TOTAL	PAUNES (AUG1)	CASA CONTRACTOR CONTRA	BELGIUM-LUX	TABANCHO COCCOCCOCCOCCOCCOCCOCCOCCOCCOCCOCCOCCO	GRETTE	IRELAND	NETHERLANDS	FINLAND	SEEDEN	TOTAL FUROPE ** ** ** ** ** ** ** ** ** ** ** ** **	BERMUN AND CARIBBEAN.	CAPIC CONTRACTOR OF CONTRACTOR	WORLD TOTAL	SAISINS (AUGI)	CANADA. FF HTM	BELGIUM-LUX	PANCE of the control	NETHENDS - TO	OTHER EUROPE	NEW PARTY OF THE P	TOTAL EUROPE	BERMUDA AND CARIBBEAN	HONG KONG	UORLO TOTAL							FEBRUARY 1983		
	YEO	: MERCENT	+2	305 +40 -32 1+230 -56 +10	-59	-100	+52	-29	+108		-100		123	-69	-100	1	18 1100	1			178	-100		ec é	+ 46	1 4	3,738 +236 +39		3	::		+355	150	12,038 +38 +19		188540 -87 -38	1 1	8.320 -100 -44	6.00	-100		100		:	762 -54 -32	TRION PA
OF U.S. EXPORTS.	SEASON- JANUARY 1982 : 1983	TONS)	1,623	1,122	17,378	370	2,871	278	20212	339025	= = = = = = = = = = = = = = = = = = =	34962	45,257	513	214	89	19	2	i -	215	001	21	24987	687	6+257	1,367	2,697	280	P 0	177	4 8 9	91	99	10,098		1,275	565 518	5,237	4,822 3,020	710	367	419	420377	(C) 10	10118	3
	1962 : 1983 :	CIN RETRIC				25.			142	~			3,965	9	10						10 a				32 923		130 437	13			84			53 145		13 134		217	93 56		11				129	HORCIC
SELECTED HORTICULTURAL FAMULES: QUANTITY JANUARY AND SEASON-JANUARY 1969, WITH CO			ALMONDS SHELLED (JULY 1) : CANADA	X																														MORLD TOTAL 10052		CANADA					000000000000000000000000000000000000000				1ES	
	COMMODITY/COUNTRY AND BEGINNING OF SEASON		ALMONDS SHELLE CANADA	BELGIUM-LUJ DENHARK	SERMANY F	ITALY	UNITED KING	FINLAND	SEEDEN	TOTAL EUROPE	BERNUDA AND	S S S S S S S S S S S S S S S S S S S	WORLD TOTAL	ALMONDS, UNSHE	TOTAL EC-TEN	FRANCE	I TALY 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	OTHER EUROPE	FINLAND	TOTAL EUROPE	BERMUDA AND	LAPAN	WORLD TOTAL	ALMONDS+ PREP.	TOTAL EC-TEN	DENMARK	GERMANY	NETHERLAND	OTHER EUROPE	NORVAY	OTHER	LATIN AMERIC	HONG KONG.	OTHER COUNTR	WALNUTS, NOT S	TOTAL EC-TEN	BELGIUM-LU DENMARK	FRANCE	ITALY	UNITED KIN OTHER EUROPE	FINLAND	SEEDEN	TOTAL EUROPE LATIN AMERIC	HONG KONG	MORLD TOTAL.	FEBRUARY 1983

SELECTED HORTICULTURAL PRODUCTS : QUANTITY OF U.S. EXPORTS.
MARKET AR SEASON-JANUARY 1983, WITH INTERPETENT

: CHANGE

SELECTED HORICULTURAL PRODUCTS : QUANTITY OF U.S. EXPORTS.
LIMILARY AND SEASON-JANUARY 1983, WITH CONTAINE.

.s. I	EXP	0	श	S																																																		
CHANGE FROM 1982 RY : LAN: BOS-	:		131 -100 -39	0 1	8 8		-100	-100	-100	20.4	4.80	-97	1 10	•		-59		6 1	-85	-100	-100	-92	411 -83 -25		1	09-	182	+121	0 0	-94	223 +160 -55		9	1,346 -100	! !	1	- 0 0 0	-100	8			-100	-72	-56	7	168 -94 -70	20						PRODUCES MIVIENCE, 715/1918.	
SEASON- JANUARY 1982 : 1983	U		215	96	•	~ :	3.6	98	25	52 24.8	24	613	*6	6	689	2.016		4694	10475	21	92	6 7 S	10 m	56	9	20	1,772	98	259	371	064		244	**	: :	•	••	33	**	60	es 4	101	214	87 S	673	96	16991						DESTOR	
ARY : 1983 :	METRI																						31								51															14							ROSTICULTURAL AND	
JANUARY	••	•••	200		-				••					•• •		**							182								19	•										=	103		116	-								
COMMODITY/COUNTRY AND BEGINNING OF SEASON		CANNED CJUNE 13	TOTAL EC-TEN	MARK	MANY, FED. REP	ECEssosssssssssssssssssssssssssssssssss	WERLANDS	TED KINGDOM	IL AND	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	ER	EUROPE	DA AND CARIBBEAN.	KOMG	COUNTRIES	TOTAL	LE. CANNED CAUME 19.	A	EC-TEM-	TARK	NCE	LY CONTREPENDENCE	HERL ANDS	TED KINGDOM	WAY	DENssssssssssssssssssssssssssssssssssss	EUROPE	AMERICA	DA AND CARIBBEAN		COUNTRIES		CARADA	EC-TEN	GIUM-LUK	NCE	MANY, FED. REP	MERLANDS	TED KINGDOM	WAY	DEMossossossossossossossossossossossossoss	EUROPE	AMERICAssessesses	KOMG CARIBBEAN		UDBLD TOTAL							PEBAULAT 1963	
FROM 1982 LANGES		+ 3.5	-56	-100	295	-63	+207	-100	101 + 101 +	36-	900	+62	+358 +358	1) 40 F #4	7			6 m	-24	•	+297	6+	101 101 101 101 101 101 101 101 101 101		610	#) un	141	-11	-11	+31	•1	-14		-21	n.	091	000			(I	-28	6		-17	in in	-7 -29 UDB:	-14						S/USDA PERMU	
JANUARY 1983		217	31 -100	1	-	15	13	1			300	51	26	240	939		8.776	999 99 9 9	9 60	25	20136	13	520		345	1,253	-	10101	1.006	1.985	4.476 -21	26.057			307	12	15	137		0 0	205	206	10.728	201	980	1.870	23.047						INCIDENTIAL PARTITUM, TO	
SEASON-	METRIC TONS)		70									318		207			-		200				1,0051								4,412			90774				239								10451							OR THOPTON, PA	
1982 : 1983	WI)	•	2	i	: :	~	*	•	-					. un				219	- 1	* :	125	:	153		45	200	968	352	217	303	611 463	3+0+6		796 THE 217												264 247	Ň						MONTHLY AND THOUSAND.	
COMMODITY/COUNTRY AND BFGINNING OF SEASON		CANADA - CANNED COUNTY 13	PET CTHM-11X	DENMARK	TTALY FED. REP	NE THER LANDS	UNITED KINGDOM	FINLAND		DTMER	TOTAL EUROPE	BERRUDA IND CARIBBEAN F	HENE KONG	OTHER COUNTRIES	WORLD TOTAL	MIXTURES 25 FRUITs PREP/PRES:	CANADA	TOTAL EC-TEM-00000000000000000000000000000000000	DENGRACE	FRANCE	SAFFFFF CONTRACTOR STATES	ITALY	UNITED KINGDOM	OTHER EUROPE	FINLAND	SEPERATIONS	OTHER	TOTAL EUROPE	BERNUDA AND CARIBBEAN	MONG KONG	OTHER COUNTRIES	WORLD TOTAL	PEACHES. CANNED COUNE 13:	CANADA FOLTON	9ELGIUM-LUX	DENHARK	1 ALY accessors and a second	NETMERLANDS	OTHER EUROPE	FINLAND	SEDEN	OTHER	TOTAL EUNOPERSONSONSONSONS	SERMUDA AND CARIBBEAN	HONG KONG	OTHER COUNTRIES.	MORLD TOTAL						FEBRUARY 1983	

Column C	ANTICE SATING	MANNET RORTICULTURAL PRODUCTS ; QUANTITY OF U.	Y OF U.S. EXPORTS.	CHANGE	STANDAL STANDAL STANDARD	MATTER PRODUCTS : 04	BUANTITY OF 1963, WITH CAN	OF U.S. EXPORTS.	**	CHANGE
		1982	JANUAR 19	FROM 1982	COPMODITY/COUNTRY AND BEGINNING OF SEASON	1982 :198		ASON- JANUARY 1982 : 198		FROM 1982 JAN:805-
	CHERIES. MARACHINO. CANNED :	N) = = = = = = = = = = = = = = = = = =		. PERCENT	SINGLE-STRENGTH JUICES	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	6ALL	SNO		PERCENT
	CANADA	53		-94	CANADA	203,469			4.356	-24
	TOTAL EC-TENssssssssssssssssssssssssssssssssssss	<u>:</u> "		-100	TOTAL EC-TEN-0-0-0-0-0-0-0-0-0-0-0-0-0-0-0-0-0-0-0	156,509			5,158	54 -6
	GERMANY, FED. REP	6 8 8 0 0 8			GERMANY FED. REP. 000000000000000000000000000000000000	156,069			7,671 4	23 -20
	ITALY	112		-100	17ALY occoors occoors NFTHERLANDS occoors occoors	::			476	** *146
	NETMERLANDS	1	-	-100	UNITED KINGDOM	0 *			2,812 -1	
1	SEEDEN	i m	23	41 *** *191 23 *50 *1	FINLAND	!!			672 -	100
	TOTAL EUROPE	1-1	108	1 6	TOTAL EUROPE	156,509			8+661 +	
	BERMUDA AND CARIBBEAN	0 h	156	144	LATIN AMERICA	110760			8,691 +5	
Colored Colo	HONG KONG	65	203	-106	HONG KONG	11.410			3.043 +	
	OTHER STATES	999	080	000	UDBE TOTAL	1180351			95.58	
100 100		141	CAPOT	* 25	SCALLE CO-Seesessessessessessessessessessessessess	2634666			+ 665.00	•
1	CANADA CANNED (APRIL 1).	;		1	CANADA	181,312			- 020	-3
1	TOTAL EC-TENsososososososososososososososososososo	1		-100	TOTAL EC-TEN-00000000000000000000000000000000000	20,745			. 936 .	0.00
	DENHARK	-		-100	FAANCE	2.745			.010	-160
	GREECE CONTRACTOR	: :		11	MTTHTH AND STATE OF S	11			• 228	9250
1	IRELAND	;		;	UNITED KINGDOM				8694	- +248
19 19 19 19 19 19 19 19	UNITED KINGDOM	: :		: :	FINCAND	:				000
1	OTHER EUROPE				NORHAY	;			.078	- +920
1	NORMAY	1 1			TOTAL EUROPE	2,745				
1	SHEDEN	: 3		100	BERRUDA AND CARIBREAN	390				
1	TOTAL	100		-100	HONG KONG	6+852				
14 36 14 16 18 18 18 18 18 18 18	BERMUDA AND CARIBBEAN	- 2		194	OTHER COUNTRIES	340400				
18	JAPAN	19		-100	WORLD TOTAL	254,161				
1971 1972	MORIO TOTAL COLONTRIES.	40.	-		PINEAPPLE (JUNE 1)	6.00				
1997 144					TOTAL EC-TEN	400			.527	• •305
1974 11-11 11-12	CANADA	99	570	7	DENMARK				368	-100
1	BELGIUM-LUX	10974	10,426	-29	GERMANY FED. REP. 6000000000000000000000000000000000000	11			.520	
12 12 12 12 12 12 12 12	DENMARKSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSS	17	239		I ALVA o o o o o o o o o o o o o o o o o o o	13			459	+347
11	GERMANY, FED. REP.	921	40156	-39	UNITED KINGDOM	0 1			,414 -10 ,251	- +29
1.5 1.5 2.5 1.5 2.5	IRELAND	ın s	- 4	100	FINLAND.					
251 251 1117 2.096 990 1071KE ENORGE MAN CANAGE MAN CAN	ITALY	1:	21	::	NORWAY	•				
119 61 125 12 125 12 125 12 125 12 12	UNITED KINGDOM	251	1+317	. 6	OTHER of contract o	: :				
119 119	FINLAND.	:	:	1	LATIN AMERICA	000				
1985 1985	NORVAY	- 004	1.177		MOME KONG	37,150				
1907 1907	O TELES	429	2,367	-24						
1	LATIN AMERICA	102	10,052	7	WORLD TOTAL	135.413				
2-361 1-666 10-40 -29 -55	MONG KONG	3.5	264	+224	CONCENTRATED JUICES					
6+023 4-142 43-652 28-733 -51 -34 TOTAL COURTER FRANCE	OTHER COUNTRIES.	2,581	22,366	-25	DRANGE, HOT-PACK (NOV 1)					
PARKER P	WORLD TOTAL	6+023	43.852	-31	TOTAL	46+608			.086 +17	5 - 12
FARMANY FED. REP. FED. R					DENMARK	! :			.056	::
REFLECTION REFLECTION REPORTS REFLECTION REFLEC					FRANCE	2,160			160 -10	
UNITED KINGOOM DIMER LAUGH STATEMENT AND THINKIAL AND DIVISION, Zas/USDA DIMER CANANA CANA					IRELANDs.s.s.s.s.s.s.s.s.s.s.s.s.s.s.s.s.s.s.				.520	09-
Second					UNITED AINSDOM				.307	64
TOTAL ENDOGE 10.00					SWEDEN SURVEYEE	54,898			F- 869	
LATIN ARCRICA					TOTAL FIRDDF	50.297			0852 +10	
1983 REFERENCE AND TATABLE PRODUCTS DIVISION, ZAS/USDA OFFICE COUNTRICES					LATIN AMERICA	4.056			.229 -8	
JAPAN COUNTRIES		THE REAL PROPERTY.	1	and see / men.	MONG KONG	10147			• 522 • 7 • 452 • •	3 -46
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13-6-60 1-5-6-62 15-5-6-	35.640 2.2550 25.344 25.00 22.2550 25.344 25.00 25.344 25.00 25.344 25.00 25.344 25.00 25.344 25.00 25.345 25.345	-100 -100 -100 -100 -100 -100 -100 -100	10 22 23 44 23 114 55	GERMAN' FED REP GRECCE GRECCE INTELANDS UNITED KINGOM OTHER TOTAL CUROPE LATIN MERICA BERNUDA AND CARIBBEAN AND ROYGE		111017 7911		1100
1,12,22 2,550 2,550 2,554 7,2445 2,550 2	14,202 2.550 63,444 2.500 65,544 2.500 65,544 2.500 65,644 2.500 65,644 788,930 1,316,410 3,42,681 15,756 65,310 3,42,681 15,756 65,329 2.12,533 7,282 2.12,533 3,444 1,62,683 2.65,223 3,344,44 1,62,683 86,991 77,295 77,295 2.65,223 3,344,44 1,62,683 86,991 77,295 2.74,410	1 -96	221 223 233 114 525 521 521 521 521	GREECE	- °#-	" " ""		123
2.550	23.600 6.264 862.035 2.122.533 2.241.478 8.683.540 7 778.8930 1.316.410 3.424.641 2 159.400 85.42 3.424.641 2 2.1.56 6.88.236 974.988 1 2.65.23 3.44.47 1.622.885 86.991 77.295 277.779	1 -92	116 411 23 114 116 54	HETHERNDS. WHITED KINGDOM. OHITED KINGDOM. OTHER. OTHER. LATIN ARRICA. BERNUDA AND CARIBBEAN.	r 644	~ 9		128
15,500 6,6	2,122,533 2,241,478 8,683,540 7 798,930 1,354,410 3,342,681 2,159,900 95,942 188,529 2,169,900 95,943 1,652,685 86,991 77,295 277,779	1 -95	23.1.* 23.1.* 5.6.	NTTED KINGOM OUNTED KINGOM OTHER CURPE TOTAL CURPE LATIN AMERICA BERNUDA AND CREBBEAN AND AND CREBBEAN	° * -			-128
2-122-533 2-241-76 8-663-54 7-711-67 -6 -14 10 INTERFECTION CREBEAN	25.942 6.264 865.055 2.125.535 2.241.478 86.683.035 169.400 45.310 33.426.61 7 15.956 6.5310 33.426.61 2 26.1360 6.85.32 974.986 1.265.25 6.85.32 974.986 1.265.25 2.31.865.32 974.986 1.265.25 2.31.865.32 974.986 1.265.25 2.31.865.32 974.986 1.265.25 2.31.865.32 974.986 1.265.25 2.31.865.32 974.986 1.265.25 2.32 974.779 986.991 77.295 2.74.779	1 -92	41 233 16 16 54	UNITED KINGDOM OTHER CURPE TOTAL CURPE LATIN ARERICA BERNOLA AND CARIBBEAN JAPAN	5 ² 1 1			-75
1,1,1,1,1,1,1,1,1,1,1,1,1,1,1,1,1,1,1,	2,122,533 2,241,478 8,683,540 7 788,930 1,516,410 3,422,681 2 15,756 8,942 168,329 261,560 6,88,36 974,988 1 2,65,23 3,943 1,628,685 86,991 77,295 277,779	2 4 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6	-14 -16 -54	OTHER. TOTAL CUROPE LATIN ARERICA BERMUDA AND CARIBBEAN JARAN	~ Z -	- 9 ! !		-73
265.23 2.74.176 6.65.25 74.75 2.75 6.75 74.75 75 75 75 75 75 75 75 75 75 75 75 75 7	79.122.533 2.241.478 8.683.540 169.400 1.516.410 3.42.681 15.756 85.942 196.329 261.560 688.256 974.988 27.258 974.988 265.223 394.347 162.86.860 86.991 77.295 277.779	4 + 65	-14 -16 -54	TOTAL EUROPE	a-	٠!!		541:5
1947-93 1-316-14 3-32-64 2-60-10-65 16 16 16 16 16 16 16	798930 1+316410 3+32661 15456 658236 744098 21,260 688236 744988 27,260 74298 27,260 74298 77,295 74460	+65	-16	BERNUDA AND CARIBBEAN	-11	11		11:5
165,940 95,512 164,920 166,920 131,514 151,514 166,514 166,924 151,514 166,514 166,514 166,514 166,514 166,514 151,514 166,514 151,514 166,514 151,514 166,514 151,514 166,514 151,514 166,514 151,5	159400 45.310 231.060 261.560 688.236 974.988 265.223 394.347 1.628.825 86.991 77.295 277.779	0 -73	-54	HONG KONG	:			***
155-256 155-	261556 6882942 1864229 261556 688226 974986 265-223 594487 14-286825 864991 77-295 277-779	2		JAPAN				470
26.522 394.34 1620.02 17.25 17.15 19.16 18.2 19.2 19.2 19.2 19.2 19.2 19.2 19.2 19	27.250 774.788 265.223 394.347 16256.025 86.991 77.295 277.779	0 +433	-21		n	2		+ 18
155-223 77,295 277,779 29,495 -11 -10 174,000 134 135 145	265,223 394,347 86,991 77,295	4 +163	35	OTHER COUNTRIES	m ;	-:		-82
256.523 394.347 16226-825 277.779 277.779 277.879 277.779 277.879 27	265-223 394,347 86,991 77,295		134		***	71		9
155-27- 155-	86.991 77.295	_	-52	HOPS (SEPT 1)				
155-276 185-176 4-30-476 24-480			-10	CANADA	343	113		-67
155-16 155-17 155-12 157-17 1				TOTAL EC-TENessessesses	804	134		- 00
2286513 221-62 540-947 719-170 - 3 933 GERANN', FED. REPRONSED 113 113 113 114 1462 1487-62 14	155,276 185,730		-17	FRANCE		1		1
1,22,263 1,53,664 1,52,74,753 4,52,74,755 4,6	228,613 221,622		•33	GERMANY, FED. REP	611	113		-81
122-655 19710-25 19710-25 1970-394 -77 12 2 177-12	88,643 153,861 401,730			IRELAND	:	:		-
117.40	100-061 00-062 047-101			ITALY	1:	:		1
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492.463 996.135 1;418.26 2 2:402.011 +102 +69	19,392 47,106 80,173		178	OTHER EUROPE		:		31
\$\text{4.15:53.5}\$ \$5.244.104 \$19.429.09\$ \$4.945.015 \$2.7\$\$ \$2.5\$\$ \$107AL ENROGENESS \$3.9 \$3.0 \$3.0 \$4.455.53.5 \$5.244.104 \$19.429.09\$ \$4.945.015 \$2.7\$\$ \$3.0 \$4.845.52 \$4.0 \$4.0 \$4.0 \$4.0 \$4.0 \$4.0 \$4.0 \$4.0	****	588		OTHER	1	:		1
\$28.399 208.763 1,215.624 646.509 66 -47 OTHER CONTRICES 139.676 122.493 196.12 10.923 44 OTHER CONTRICES 139.676 13.499 47.360 26.836 -43 -45 CERMAN FED RECEIPH-UX 23.680 13.419 47.360 26.836 -43 -43 CERMAN FED RECEIPH-UX 11.03 26.03 67.403 40.843 -43 CERMAN FED RECEIPH-UX 11.04 10.84.054 10.873.09 65 -35 CERMAN FED RECEIPH-UX 13.629.073 572.783 3.231.794 1.484.524 -65 54 COTHER CHARDE 14.629.073 572.783 3.231.794 1.484.524 -65 54 COTHER CONTRIBERAN 15.629.073 572.783	4924483 9986133 14186289 401456533 562440104 1564296093	175 +27	694	TOTAL EUROPE	*08	134	1,725 263	3 -83 -85
\$28.599 2.08.763 1.215.624 646.509 -60 -47 OTHER COUNTRIES. 423.091 145.959 707464 477.602 -66 -32 WORLD TOTAL. 139.676 1224.93 707364 477.602 -66 -32 WORLD TOTAL. 23.687 18.663 12.1103 -100 -66 TOTAL. 23.680 13.419 47.360 26.838 -43 -43 FERCE. 47.360 26.838 -43 -43 FERCE. 47.360 26.838 -43 -43 FERCE. 47.360 13.419 47.360 26.838 -43 -43 FERCE. 47.273 26.036 63.303 40.84952 FERCE. 54.059 173.139 1.073.009 232.659 -73 -78 SERPORE. 1.629.073 572.783 3.231.794 1.484.524 -65 -54 TOTHER ENORGE. 1.629.073 572.783 3.231.794 1.484.524 -65 -54 TOTHER COUNTRIES. 1.629.073 572.783 3.231.794 1.484.524 -65 -54 FERPORE. 1.629.073 572.783 572.				BERMUDA AND CARIBBEAN-	200	111		+264
\$23.099 208765 31.25.624 646.502 -66 -37 DOTHER COUNTRIES				JAPAN	67	62		00
1995 1995	528,399 208,763 1,215,624	-60	-47	OTHER COUNTRIES	408	153		-63
139.676 122.93	425,091 145,959 707,464	- 66	, in	WORLD TOTAL	1,965	823		-58
23.667 18.663 121.103 -100 -66 CANDARAN	139-676 122-493 272-385	-12		· tdags theatra				
5.067 18.663 61.408 32.310 268 47 TOTAL EC-FEN 24 69 23.680 13.419 47.360 26.638 47 TOTAL EC-FEN 25 68 1.103 26.003 65.303 40.849 52 GERMIN' FED REP 11 35 44.7874 186.112 867.27 56.20 58 5.37 TRELAND 11 35 44.7874 186.112 87.427 20.58 5.37 TRELAND 11 35 540 2.024 20.362 17.427 20.56 5.36 NRTHERANDS 10 30 64.069 173.139 1.073.009 222.659 73 78 TOTAL EUROPE 10 50 1.629.73 572.83 3.231.794 1.4484.224 -65 54 TOTAL EUROPE 274 R1 BERNILOA AND CARBELAN 275 CARBELAN	2780348	-100	24	CANADA	:	:		-
23.680 13.419 47.360 26.838 -43 -49 DONAMARK	5,067 18,663 61,408	+268	.47	TOTAL EC-TENsossossossoss	24	69		+191
23.680 13.919 47360 26.036 4.3 100 DENMERK				BELGIUM-LUX	1			-100
1103 26,005 653.03 40.649 81.65 55.05 667.427 566.220 58 58 58 58 58 58 58 5	47,360	1	00	DENMARK	:	-		1
1.103 26.003 65.003 40.499 1 25.004	230000 130000 0200 020000000000000000000	D :	9 (4	FRANCE	:			
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7.273 2.545 34.182 21.899 -65 -36 NITHERLANDS	447.874 186.312 867.427	0	200	TOTAL AND	1 8	:		1
540 2.024 20.362 17.427 4275 -14 UNITEO KINGDOM	7,273 2,545 34,182	0	36	NF THERL AND Sono on one one	1.0	30		+199
1,629,073 572,783 3,231,794 1,484,524 -65 -54 1,471N AMERICAL PROPERTY OF COUNTRICE CONTRICES COUNTRICES COUNT	540 2,024 20,362	1	14	UNITED KINGDOM	1			
50 173.139 1.0173.009 2.22.659 -73 -78 SWEDEN		0		OTHER EUROPE :				
1.629.073 572.783 3.231.794 1.484.524 -65 -54 TOTAL EUROPE	644.069 173,139 1,073,009	6	.78	SWEDEN	1	:		-100
1.027.073 572.783 5.231.774 1.484.524 -65 -54 TOTAL EUROPE	918	379 -100	16	OTHER	:	5.0		:
EATHWARELLAKED TROPICAL PRODUCTS DIVISION, PAS/USDA OTHER COUNTRIES	100290013 5/20/83	- 69- +20	9.0	TOTAL EUROPE	25	119	194 255	+382
SAN TRANSPORTED TO TRANSPORTED BYTISTON, PAS/USDA OTHER COUNTRIES.				DEDMINA AND CADIBREAN.	473	7 6		-100
HODELTCHITHTHAI AND TROPICAL PRODUCTS DIVISION, FAS HOLD	1	and the transfer		OTHER COUNTRIES.	7.3	52	183 79	9 -28 -5
1983 HOKILOULUNA AND LANGE	FEBRUARY 1983 HORTICULTURAL AND TROFICAL PRODUCTS DIVISION	N, FAS/ USUM		WORLD TOTAL	377	252	,	-33

SELECTED HORTICULTURAL PRODUCTS: QUANTITY OF U.S. EXPORTS. JANUARY AND SEASON-JANUARY 1983, WITH COMPARISONS

JANUARY AND	SEASON-JANUARY	1983, WITH	COMPARISONS			
:					: CH	ANGE
					:FROM	1982
COMMODITY/COUNTRY :	JANUARY		SEASON- J	ANUARY		
AND :	1982 :		1982 :		JAN:	BOS-
BEGINNING OF SEASON :-						JAN
			GALLONS		PER	RCENT
WINES. FROM FRESH GRAPES JAN:						
CANADA	440.046	319.752	440.046	319,752	-27	-27
TOTAL EC-TEN	110.411	42.012		42.012		_
BELGIUM-LUX	2.088	2,140	2.088	2.140		
DENMARK	4.869	24140	4.869		-100	
FRANCE	6.355		6.355		-100	
	39	22.379	39			***
GERMANY, FED. REP				22,379		
NETHERLANDS	4,918	1.837	4,918	1.837		
UNITED KINGDOM	92,142	15.656	92,142	15,656	-83	-83
OTHER EUROPE						
SWEDEN		2,430	***	2,430		***
OTHER	12,245	642	12,245	642		-95
TOTAL EUROPE	122,656	45.084	122,656	45.084		-63
LATIN AMERICA	37,224	25,288	37,224	25,288		-32
BERMUDA AND CARIBBEAN:	78.682	34,376	78,682	34,376	-56	-56
HONG KONG	3,701	13,222	3.701	13,222	+257	+257
JAPAN	13.065	16.718	13.065	16,718	+28	+28
OTHER COUNTRIES	23.426	37.191	23.426	37,191	+59	+59
WORLD TOTAL	718,800	491,631	718,800	491,631	-32	-32

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